

# CTIconnect PRO 3.x



## User Manual

Version updated on: 04.07.2014  
WMS version: 3.x

*CTIconnect PRO is the Wildix collaboration tool. The application allows the users of the system to monitor the presence status of their colleagues and to contact them using all available communication means: audio and video calls, chat, virtual Post-It messages, Fax and SMS, conferences, desktop sharing.*

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# Start CTIconnect

## Requirements

CTIconnect 3.0 supports the following browsers:

- Chrome 17.0 or higher
- Safari 5.1 or higher
- IE10 or higher
- Firefox 17 or higher
- Opera

CDRview and Zero Distance applications require Java 7.

CTIconnect PRO can be accessed from PC with any OS, or iPhone, iPod Touch and Android phones (download CTIconnect Mobile application from the App Store and Google Play)

## First time access

- Open your browser and insert the URL address or domain name of your local PBX

http://[IP or domain of your Wildix PBX]

E.g: http://192.168.1.70 http://ltd.pbx.com

- Enter your Login and Password → click on "Login"

You can use User name, extension number or email address as "Login"



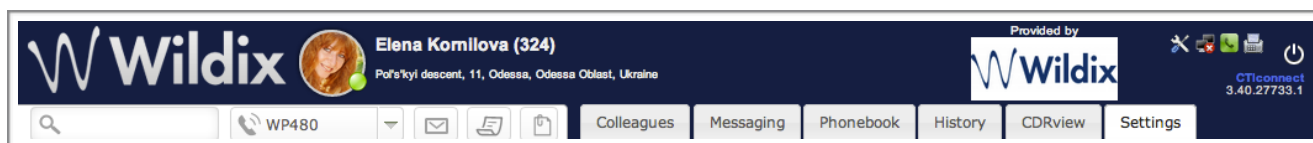
Once you access to the CTIconnect, follow the pop-up notifications which introduce you to the interface and help you to add contacts, enable desktop notifications and geolocation, install the integration utility for Windows or Mac OS X.

Read the chapter "**Colleagues menu: Edit your colleagues list**" to learn more about adding colleagues to your roster.

## Additional licenses

- **Zero Distance:** the extension that allows you to make audio, video calls from your PC, share your desktop, organize text, audio, video conferences.
- **CDR-View:** the tool that provides you with the information for the analysis and control of the call activity in the company.
- **Server FAX:** allows you to send and receive FAX and SMS via CTIconnect.
- **Attendant Console:** extension for call agents that allows managing the calls directly from the numeric keyboard.
- **Windows / Mac OS X integration component:** allows you to make calls from different Windows / Mac OS X applications and send faxes with Wildix Fax Printer.
- **Screen sharing component:** desktop sharing and remote desktop control.






## Upper menu






Upper menu allows you to change your activity status, edit your picture, set up your geographic position, select the device for call generation from CTIconnect, use the search field for different operations.

CDRview menu is available only in case CDR-View application is activated on the PBX.

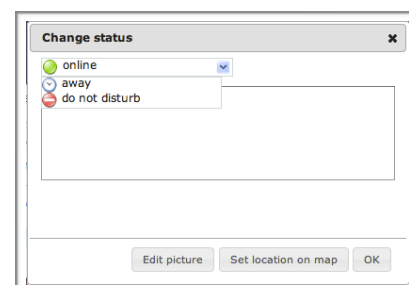
In the upper right corner the current WMS version is indicated.

-  - Logout from CTIconnect
-  - WMS access (available only for users with admin permissions)
-  - Screen sharing manager
-  - Attendant Console access (available only in case Attendant Console application is activated)
-  - The list of all outgoing faxes (available only in case Fax Server application is activated)

-  - Search field
-  - Device selection for generation of calls from CTIconnect
-  - SMS, Fax, Post-It buttons (SMS and Fax buttons are available in case Fax Server application is activated)

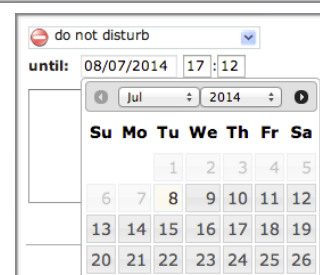
## Change your status

- Click on your personal image
- Select the status: online / away / do not disturb
- Add a status message (optional)
- Click on "OK"



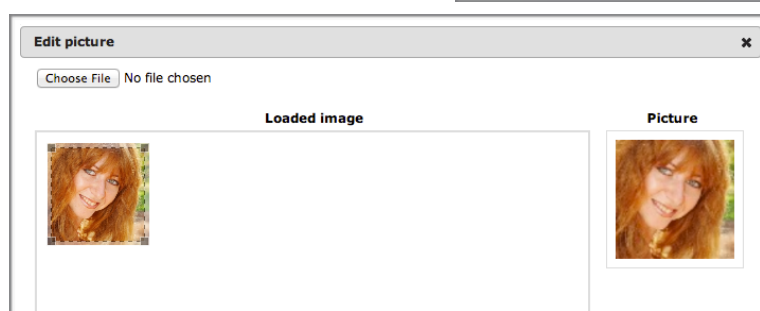
"Away" and "DND" status automatically changes to "Online" after one hour. To set up a different expiry date and time for your status, edit the field "until".

The status is synchronized on all the supported devices (PC, WP phones, W-AIR, iOS and Android mobile app)



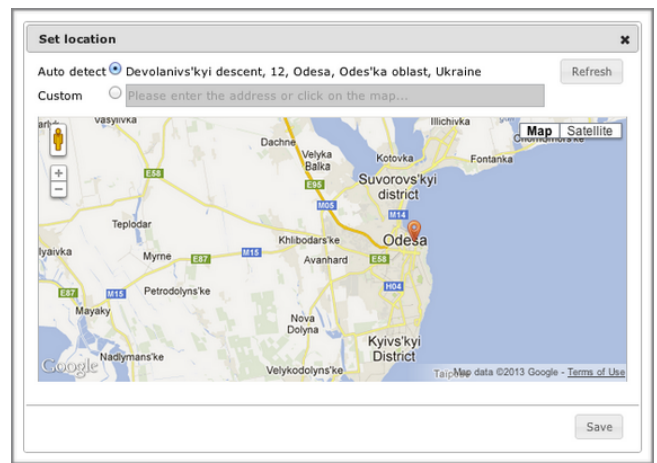
## Edit your avatar

- Click on "Edit picture"
- Choose the file
- Resize the image (optional)
- Click on "Save"



## Set up your location

- Click on the map icon
- Select "Auto detect" to allow the automatic detection of your location
- Select "Custom" to set up your location manually: enter the address into the field or move the red indicator
- Click on "Save"



## Use the search field

Search field serves to find contacts and to start any type of communication with them. You can type a name or a phone number (user name or extension number, name or phone number present in the corporate phonebook, or any external number) and select the means of communication from the list of available options.

**Search in the colleagues' phonebook:** enter the user name or the extension number into the field. In case a contact is not present in your colleagues' list, click on "+" to add a user to your roster. Users of the system appear in the "Colleagues" section

**Search in the corporate phonebooks:** enter the contact name or the phone number into the field. Phonebook contacts appear in the "Contacts" section. In case a contact is not present in a phonebook, click on "Add contact" to create a new contact.

**You can use the search field for different types of communication:**

- Point the mouse cursor at the contact name or phone number to view the list of available options
- Select the type of communication from the list

Available communication options for colleagues: Call (extension number), Call (mobility extension number), SMS (mobility extension number), Fax (fax number), Chat, Send Post-It, Call me back, E-Mail, Show contact.

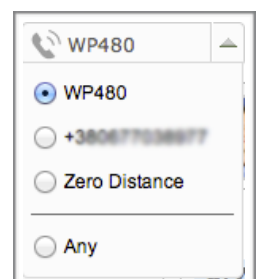
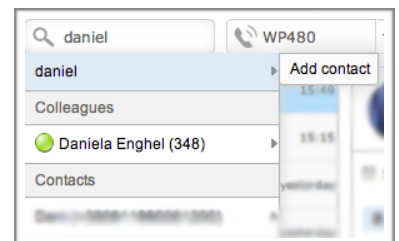
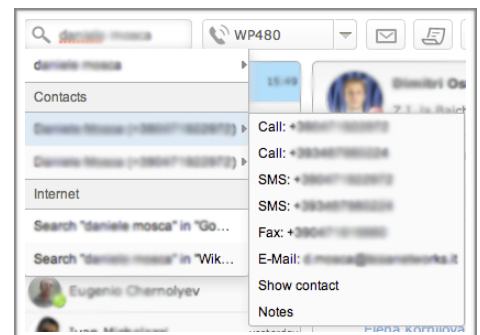
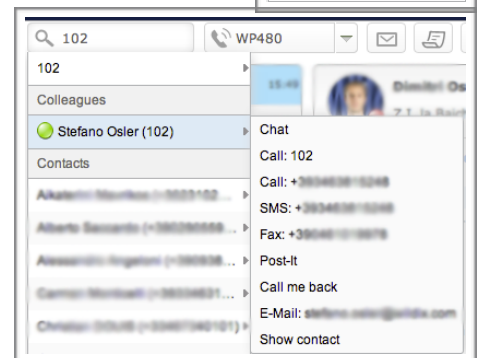
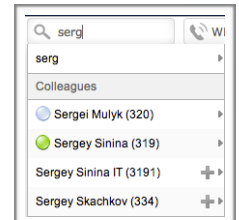
Available communication options for phonebook contacts: Call (mobile number), SMS (mobile number), Fax, E-mail, Show contact (open the contact's profile), Note (add a note).

To learn more about using the Search field for different operations, please read the chapter "**Operations**".

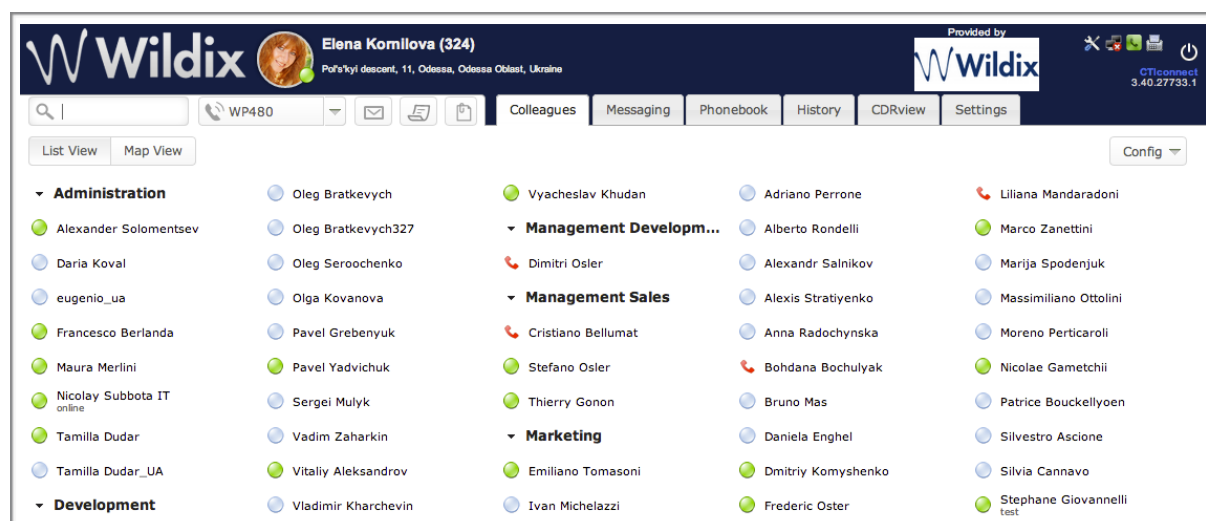
## Device selection

You can select the device for call generation from CTIconnect PRO:

- Click the device selection button to view the list of devices registered to your extension (WP phones, Zero Distance Client, W-AIR, Mobility extension number, or "any device")
- Select the device that you want to use.

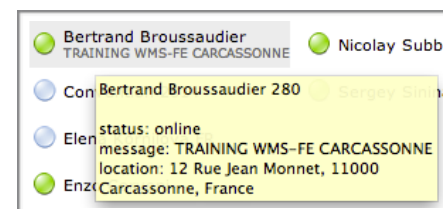


# Colleagues menu

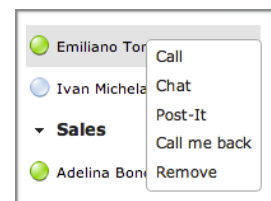


Users appear in **Colleagues menu** subdivided according to their ACL groups set up in the WMS (e.g. Administration, Marketing, Sales). The presence and availability status is visualized for each user.

To view additional information for each user (extension number, geolocation, status message): focus the mouse cursor on the user:

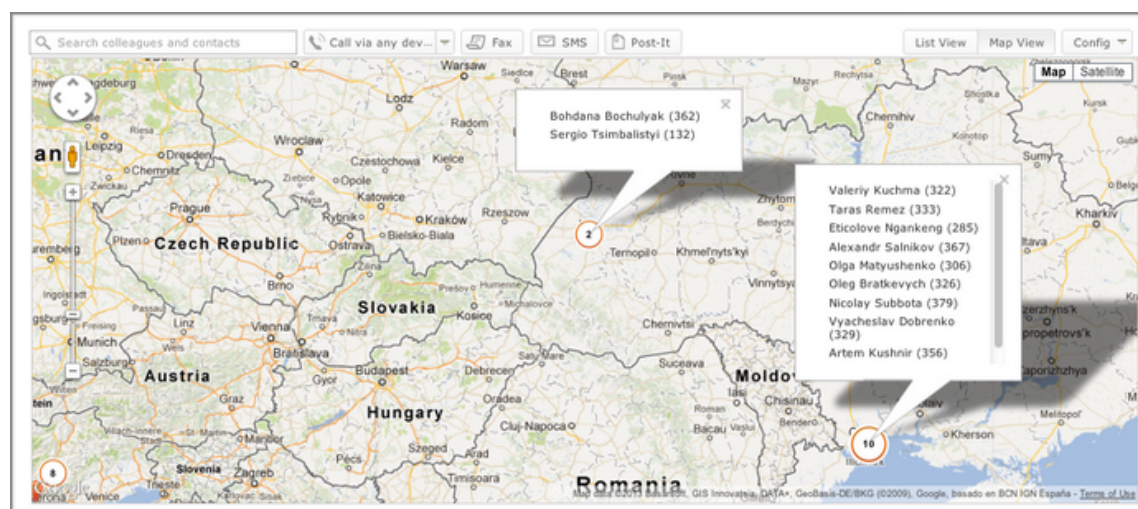


Click on the contact with the right button to start different types of communication: *Call*, *Chat*, *Post-It*, *Call me back*, or to remove the user from your roster ("*Remove*" option).



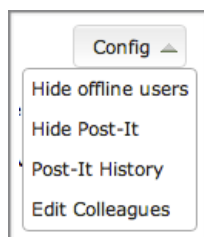
The buttons "*List view / Map view*" allow to change the appearance of the **Colleagues menu**:

- Click on "*Map View*" to view the location of your online colleagues
- Click on "*List View*" to come back to the usual appearance of the **Colleagues menu**





"Config" button allows you to:



- Hide offline users
- Hide Post-It
- Access the Post-It History
- Edit colleagues





## Presence status of users

-  - online
-  - offline

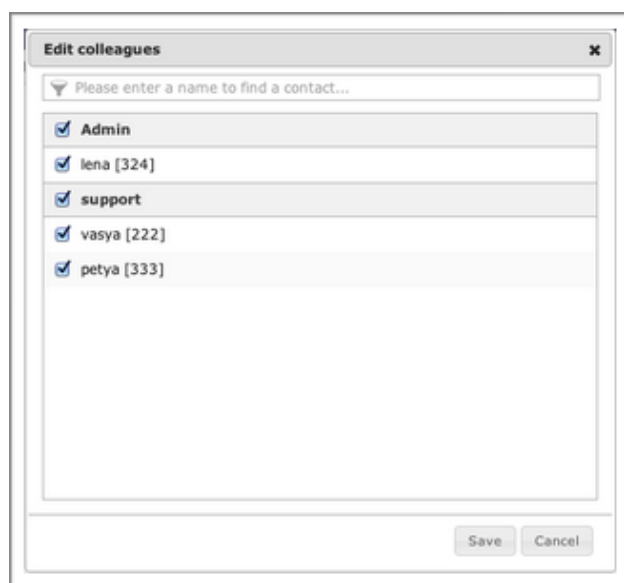
-  - user has set up "do not disturb" status
-  - user has set up "away" status

-  - user has set up "do not disturb" status before going offline
-  - user has set up "away" status before going offline

-  - talking on the phone
-  - receiving an incoming call

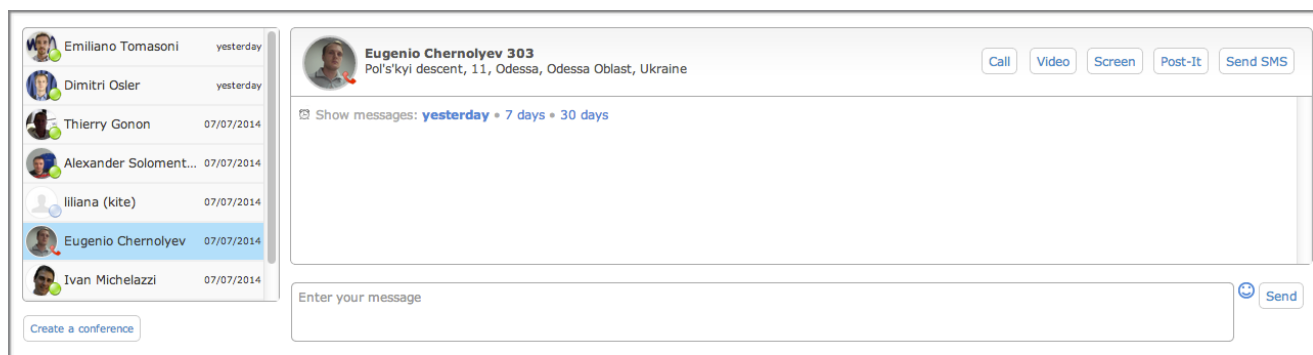
## Edit your colleagues list

- Click on "Config" → "Edit Colleagues"
- Select the users you wish to add to your roster (use the search field to find a user by name or extension number)
- Click on "Save"



## Messaging menu

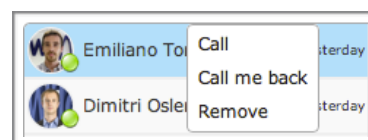
Once you click on “Chat”, you are is redirected from the **Colleagues** to the **Messaging menu** and you can start typing your message.



The buttons “Call”, “Video”, “Screen”, “Post-It” and “Send SMS”, allow you to initiate different types of communication with the user directly from the Messaging menu.

The button “Create a conference” is available (same as “Video”) only i case Zero Distance application is activated. For more information, please read the quick guide “Zero Distance”.

In the left section the list of the active chat sessions is visualized. Select a user on the list and click with the right button to close the chat session with this user (“Remove” button), to send a “Call me back” request or to make a call:




## Send a chat message

- Focus the cursor on the input field
- Type your message
- Click on “Send message”

To view the chat history: go to the top of the chat window with the user and select the time period:



Click on the icon  to view the list of emoticons that you can use in the chat.

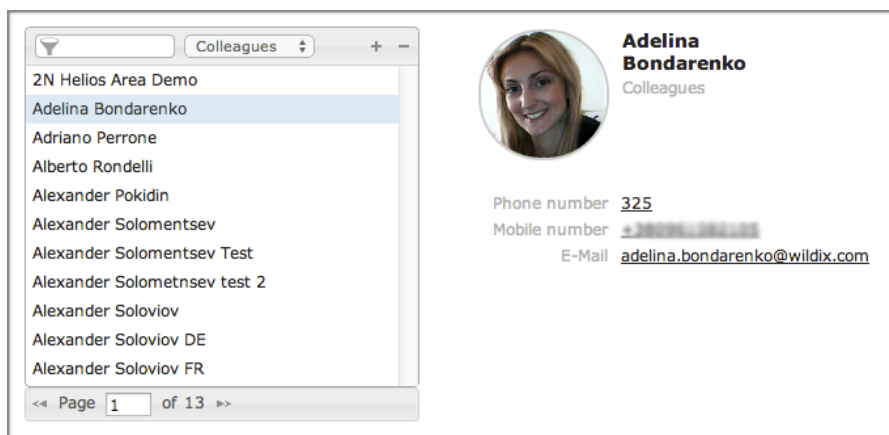


## Phonebook menu

The **Phonebook menu** allows you to manage your contacts and to consult the corporate phonebooks.

### Find a contact:


Enter the name into the search field above the contacts list. You can also specify the phonebook to search in.

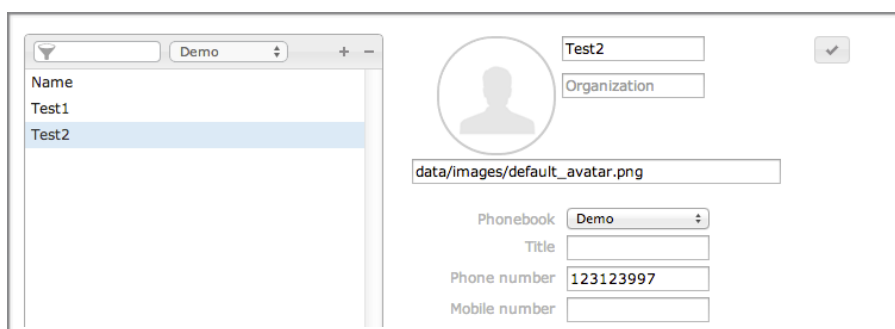


The screenshot shows a web interface for a phonebook. On the left, there is a search bar and a dropdown menu set to 'Colleagues'. Below this is a list of contacts, with 'Adelina Bondarenko' selected. On the right, the profile of Adelina Bondarenko is displayed, including her photo, name, and contact details: Phone number 325, Mobile number (redacted), and E-Mail adelina.bondarenko@wildix.com. At the bottom of the list, it says '<< Page 1 of 13 >>'.

## Manage contacts

### Add a contact:



- Click the "+" button
- Fill out the fields
- Click on the icon .

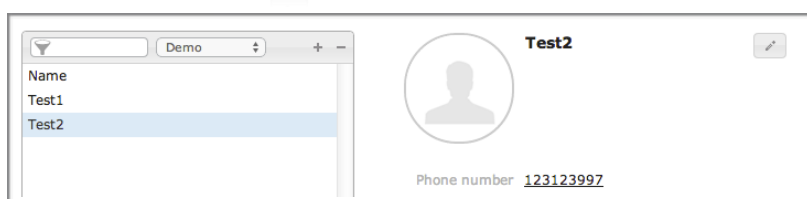


The screenshot shows the 'Add a contact' form. On the left, there is a list of existing contacts: 'Test1' and 'Test2'. On the right, there is a form to add a new contact. The form includes fields for Name (Test2), Organization, Phonebook (Demo), Title, Phone number (123123997), and Mobile number. There is also a checkbox for 'Verified' and a 'Save' icon.

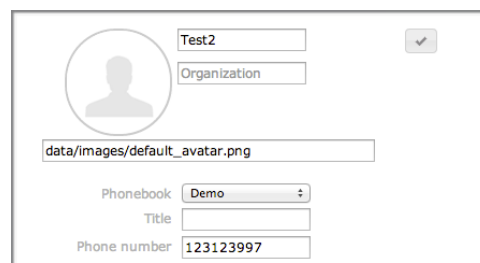
**Delete a contact:** select a contact and click the "-" button.

### Edit a contact:

- Select a contact
- Click on the icon .
- Make the changes
- Click on the icon .




The screenshot shows the 'Edit a contact' form. On the left, there is a list of existing contacts: 'Test1' and 'Test2'. On the right, there is a form to edit a contact. The form includes fields for Name (Test2), Organization, Phonebook (Demo), Title, Phone number (123123997), and Mobile number. There is also a checkbox for 'Verified' and an 'Edit' icon.

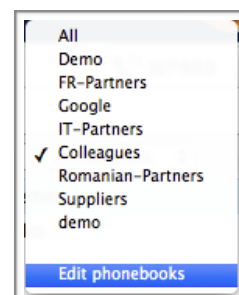


The screenshot shows the 'Edit a contact' form. On the left, there is a list of existing contacts: 'Test1' and 'Test2'. On the right, there is a form to edit a contact. The form includes fields for Name (Test2), Organization, Phonebook (Demo), Title, Phone number (123123997), and Mobile number. There is also a checkbox for 'Verified' and an 'Edit' icon.

### Edit a phonebook:

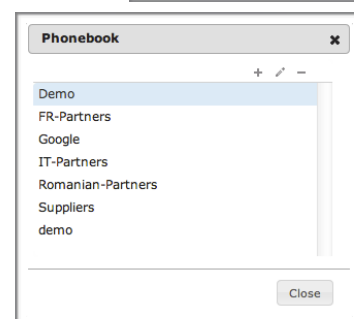
Click on the list of phonebooks and select "Edit phonebooks":

- To add a new phonebook, click the "+" button.
- To delete a phonebook, select one and click the "-" button.
- To rename a phonebook, select a contact and click the icon  → enter a new name into the field → "Save".



The screenshot shows the 'Edit phonebooks' dialog. It contains a list of phonebooks: All, Demo, FR-Partners, Google, IT-Partners, Colleagues (selected), Romanian-Partners, Suppliers, and demo. There is an 'Edit phonebooks' button at the bottom.

You can move the contact from one phonebook to another one by editing a contact profile (the field "Phonebook")



The screenshot shows the 'Phonebook' dialog. It contains a list of phonebooks: Demo, FR-Partners, Google, IT-Partners, Romanian-Partners, Suppliers, and demo. There is a 'Close' button at the bottom.


## History menu

You can consult the log of all made, received and missed calls, incoming and outgoing faxes, voicemail messages.



	Date	Duration
Tamilla Dudar	yesterday	0:04
Bohdana Bochulyak	07/07/2014	0:58
CC, Bohdana Bochulyak	07/07/2014	0:40
Bohdana Bochulyak	07/07/2014	0:00
Bohdana Bochulyak	07/07/2014	0:00
Ililiana	07/07/2014	1:37
Nicolae Gametchii	07/07/2014	1:28
Emiliano Tomasoni	04/07/2014	1:40

Missed calls are marked with red color.

Outgoing calls are visualized on the list with the relative icon: 

The "CDRview" button allows you to access CDR-View directly from the **History menu**. The button is available only in case CDR-View application is activated.


The "Notes" button allows you to access the notes history added by the users of the system.


Use the search field above the list of events to specify the search parameters:


- Enter a user name or an extension number to find events relative only to this user
- Select the type of event from the list: All/Missed/Voicemail/Fax in/Fax out
- Specify the date to view the events that took place before the selected date.



Emiliano		Date	Duration
Emiliano Tomasoni	✓ All	04/07/2014	1:40
Emiliano Tomasoni	Missed	02/07/2014	1:32
Emiliano Tomasoni	Voice mail	02/07/2014	0:55
Emiliano Tomasoni	Fax in	02/07/2014	1:57
Emiliano Tomasoni	Fax out	01/07/2014	3:56
Emiliano Tomasoni		01/07/2014	3:44
Emiliano Tomasoni		30/06/2014	1:51
Emiliano Tomasoni		30/06/2014	5:41
Emiliano Tomasoni		30/06/2014	0:00

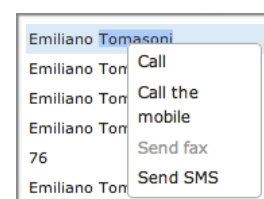
Recorded calls appear on the list with attachments that can be downloaded by clicking on the relative icon: . Recording is available only in case Attendant Console application is activated.

Voicemails appear on the list with attachments that can be downloaded by clicking on the relative icon: .

Faxes appear on the list with attachments that can be downloaded by clicking on the relative icon: .

### Make a call, send Fax/SMS:

Click on the contact with the right button and select the option from the list: *Call*, *Call mobile*, *Send Fax*, *SMS*.



Emiliano Tomasoni	Call
Emiliano Tomasoni	Call the mobile
Emiliano Tomasoni	Send fax
Emiliano Tomasoni	Send SMS

# Operations

Various communication options are available from different menus of CTIconnect PRO.

The **search field** can be used to start any type of communication with colleagues, phonebook contacts or external users.

The buttons of the **upper menu** allow you to send SMS and faxes (in case Fax Server application is activated), send Post-It reminders to the users of the system.

It is possible to start different types of communication from the **Messaging, Phonebook** and **History menus**. For detailed information, please consult the relative chapters of this manual.

## Make a call

### *Call a user*

**Colleagues Menu.** Click on the user with the right button → select the option “Call”.

**Search field.** Enter the user name or extension number → point the mouse cursor at the contact name → select the option “Call: [extension number]” or “Call: [mobile extension number]” from the list.

### *Call a phonebook contact*

**Search field.** Enter the name of the contact → point the mouse cursor at the contact name → select the option “Call: [phone number]”.

### *Call an external number*

**Search field.** Enter the phone number with the prefix → click the device selection button

### *Answer a call*

It's possible to respond an incoming call directly from the CTIconnect PRO interface in case the applications Attendant Console and Zero Distance are enabled.

For more information please read the guides “CTIconnect Attendant Console” and “Zero Distance”.

## Start a chat session

**Colleagues Menu.** Click on the user with the right button → select the option “Chat”.

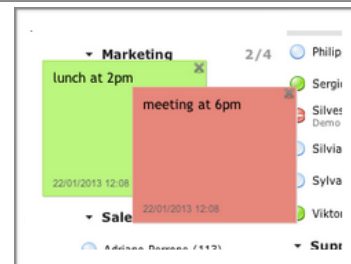
**Search field.** Enter the user name or extension number → point the mouse cursor at the contact name → select the option “Chat” from the list.

## Send a Post-It message

### Post-It button.



- Click the button
- Enter the user name or extension number into the field "To". You can enter several names / numbers, separated by comma
- Tick off "Personal reminder" in case you would like to leave a personal reminder for yourself
- Enter your message into the input field
- Tick off the field "Send Post-It as SMS", in case you want to send a message to the user's mobile extension number
- If you would like to change the priority of the message: click the "Normal" button and select "Important". The message will be published with the red color
- Click "Send"



**Search field.** Enter the user name or extension number → point the mouse cursor at the user name → select "Post-It" from the list.

**Colleagues menu.** Click on the user with the right button → select the option "Post-It".

### Post-It history

- Click on "Config" button → "Post-It History"
- Click on "Show" to view the message
- Click on "Clear history" to delete all old messages

Date	From	Message	
22/01/2013 12:07	Me	test	Show
22/01/2013 12:08	Me	meeting at 6pm	Show
22/01/2013 12:08	Me	lunch at 2pm	Show
22/01/2013 12:28	elena.test (3241)	Call me back	Show

Page: 1

## Send a fax

It's possible to send faxes and SMS in case Fax Server application is enabled.

### Fax button



- Click the button
- Enter the fax number or the contact name into the field "Fax number"
- Choose the file to send
- Tick off "Faxcover" in case you would like to include the fax cover page
- Tick off "Postpone delivery" and select a different date in case you wish to postpone the fax delivery date
- Click "Send"

**Search field.** Enter the user name or extension number → point the mouse cursor at the contact name that appears below → select "Fax: [fax number]" from the list.

## Send an SMS

### SMS button



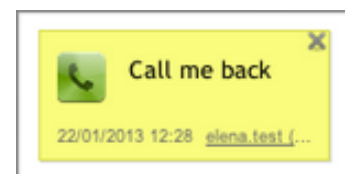
- Click the button
- Enter the contact name or the mobile number into the field "Mobile #". You can enter several numbers separated by comma
- Enter the text message into the input field
- Tick off "Postpone delivery" and select a different date, in case you wish to postpone the SMS delivery date
- Click "Send"

**Search field.** Enter the user name or extension number → point the mouse cursor at the contact name → select "SMS: [mobile extension number]" from the list.

## Send "Call me back"

**Search field.** Enter the user name or extension number → point the mouse cursor at the contact name → select "Call me back" from the list.

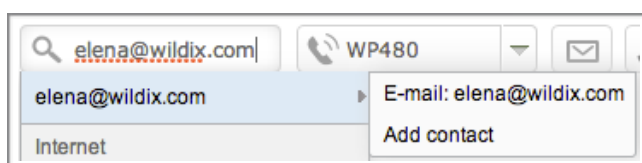
**Colleagues menu.** Click on the user with the right button → select the option "Call me back".



## Send an email

**Search field.** Enter the user name or extension number → point the mouse cursor at the contact name → select "E-mail [email address]" from the list.

You can enter any email address of a contact not present in the phonebook into the field and click on the address that appears below the search field to send a letter.



# Settings

## Personal

The menu allows you to change your password, add email address and mobile number, change the language, upload and edit your avatar, add a popup URL (click on the icon “?” to view a prompt about the syntax used for adding an URL)



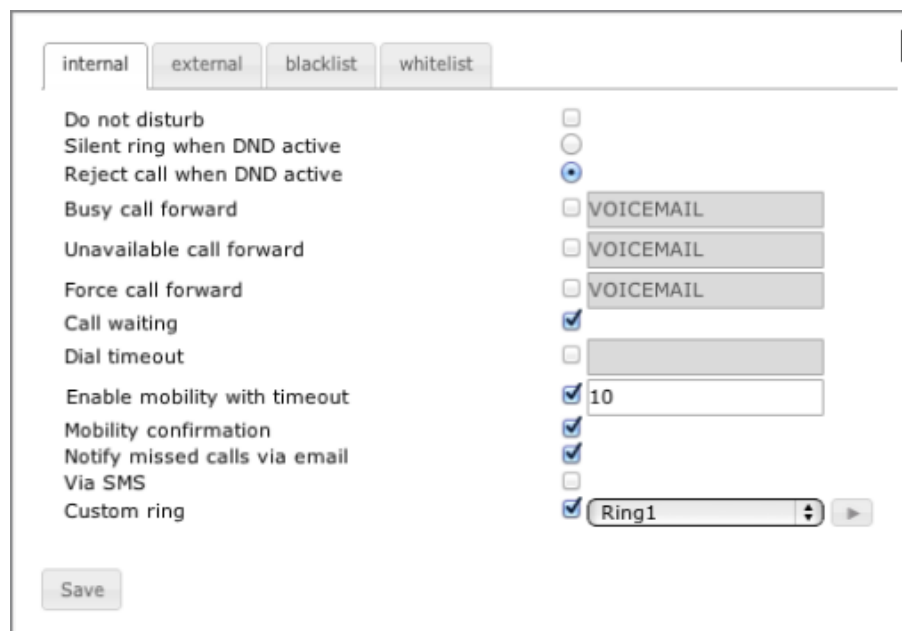
The screenshot shows the 'Personal' settings tab. It includes fields for Password (with a 'Change password' link), E-Mail (elena.kornilova@wildix.com), Mobile number (+1234567890), Language (English), Avatar (with 'Edit your avatar' and 'Delete your avatar' buttons), and a Popup URL field with a help icon. A 'Save' button is at the bottom left.

Click on “Save” to apply the changes.

## Features

Call features for every Call class (internal, external, blacklist, whitelist)

Features can be changed directly from the phone: press the soft key “Featur.”



The screenshot shows the 'Features' settings for the 'internal' class. It lists various call features with checkboxes or input fields: Do not disturb, Silent ring when DND active, Reject call when DND active, Busy call forward, Unavailable call forward, Force call forward, Call waiting, Dial timeout, Enable mobility with timeout, Mobility confirmation, Notify missed calls via email, Via SMS, and Custom ring. A 'Save' button is at the bottom left.

- **DND:** enable the feature and tick off “*Silent ring*” or “*Reject call*” for DND mode
  - *Silent ring*: you receive incoming calls, but there is no audible signal
  - *Reject call*: you do not receive incoming calls, they can be forwarded to another extension or to the voicemail (if specified in *Call forward* field)
- **Call Forward:** enable *Busy* or *Unavailable call forward* and enter the extension number or VOICEMAIL, to forward the calls when busy or unavailable, enable *Force call forward* to forward all the incoming calls

- **Call waiting:** allows you to receive several calls at a time
- **Dial timeout:** if enabled, the call is terminated in case there is no answer within a specified timeout

- **Enable mobility with timeout:** mobility extension management.

Check the box and insert the timeout in seconds into the field\*

To use mobility extension feature, you should first enter your mobile phone number in *Settings > Personal > Mobile number*

- **Mobility confirmation:** if enabled, the user is notified on who the caller is when he receives the call on mobility extension number

- **Missed calls notification:** enable missed calls notifications via SMS or email

- **Custom ring** allows you to set up the ringtone.

Check the box and select the ringtone from the list, click on *Play* to listen to the melody

Click on "Save" to apply the changes

In the same way you can set up **the preferences for another call class:** click on the folder "external", "whitelist", "blacklist":

- Enable "Activate class"
- If you check the box "Modify from phone", the features modified from phone are applied also to this call class

## Function keys

Set up the BLF keys of your phone

Depending on the model, WP phones have different numbers of Function keys: WP480, WP490 have 3 Line keys, WP600 has 6 Line keys, WP490 and WP600 in addition have 10 Memory keys. You can set up the behavior of both Line and Memory keys.

### To set up the Function keys:

First click on "+Line" to add a number of lines; for instance, if you wish to have three lines, add three "+Line" buttons.

Now you can start adding other Function buttons. If your phone has six Line buttons (WP490 or WP600), the first three buttons become line keys, and you can set up the remaining Line keys and 10 Memory keys as other Function buttons.

Below you will find a detailed explanation about the usage of the Function Keys and their LED indications

**+Colleague:** enter an extension number into the field

USAGE	LED (Line keys)	LED (Memory keys)
<ul style="list-style-type: none"> <li>- monitor the activity status of a colleague</li> <li>- speed dial</li> <li>- pickup a ringing call of a colleague</li> </ul>	solid green: user is available blinking: user is talking on the phone	solid green: user available blinking red: incoming call red: user is talking on the phone

**+Line:** add the button only for Line keys (first 3 or 6 buttons, depending on the model)

USAGE	LED (Line keys)
press the button to use the line / to answer the incoming call	green: the line is in use at the moment blinking: incoming call on the line / there is a call on hold off: the line is not in use at the moment

**+Empty key:** add an empty key

**+Trunk:** select the trunk from the list

USAGE	LED (Line keys)	LED (Memory keys)
<ul style="list-style-type: none"> <li>- monitor the status of the trunk (in use/available)*</li> <li>- make a call via the trunk</li> </ul>	solid green: trunk is available blinking green: trunk is in use	green: trunk is available  red: trunk is in use

\* you cannot monitor the status of SIP trunk (you can only see if it's on or off)

**+Timetable:** select the timetable from the list

USAGE	LED (Line keys)	LED (Memory keys)
<ul style="list-style-type: none"> <li>- monitor the status of the timetable</li> <li>- press the button to change the status of the timetable (on/off/check time)</li> </ul>	solid green: off ("never active" in WMS) rapid blinking: timetable status is "check time"	solid green: off blinking red: "check time"

**+Switch:** select the switch from the list

USAGE	LED (Line keys)	LED (Memory keys)
<ul style="list-style-type: none"> <li>- monitor the status of the switch</li> <li>- press the button to change the status of the switch (on/off)</li> </ul>	solid green: off blinking: on	solid green: off solid red: on

**+ 3 state switch:** select the 3 state switch from the list

USAGE	LED (Line keys)	LED (Memory keys)
<ul style="list-style-type: none"> <li>- monitor the status of the switch</li> <li>- press the button to change the status of the switch ( on/off/extra)</li> </ul>	solid green: off ("disabled" in WMS) rapid blinking: switch status is "extra" blinking: on ("enabled" in WMS)	solid green: off blinking red: "extra" solid red: on



+ **Group pick up**: select an ACL group from the list

USAGE: Press a button to pickup a ringing call of a group member

Note: group pick up does not work in WMS Network

+**Call group status**: select the call group from the list

USAGE	LED (Line keys)	LED (Memory keys)
- monitor when there are incoming calls to call groups - press the button (when blinking) to pick up a ringing call of a call group	solid green: active rapid blinking: incoming call	solid green: active blinking red: incoming call

+**Dial call group**: select the call group from the list

USAGE: Press the button to dial a call group

+**Send DTMF**: enter the digits into the field

USAGE: Press the button during the conversation in order to send DTMF

+**Local Phonebook**: enter the phonebook name into the field

USAGE: Press the button to access to the local phonebook → now you can add contacts to the phonebook, edit a contact, dial a contact

Click on “**+Add exp**” to add a key expansion.

Click on “**Save**” to apply the changes

## Fax Server

Fax cover settings: upload the logo, enter Company, Fax machine id and header

Click on “**Save**” to apply the changes

## Extensions

- Launch Zero Distance extension to make and receive calls via Zero Distance Client
- Install Fax Printer Component for Microsoft Windows, to be able to send faxes via Windows applications
- Install MacOs Integration Component to be able to make calls from different Mac Os X applications and send faxes via Wildix Fax Printer
- Install the Desktop Sharing component to be able to share your desktop and give remote access to your desktop